

GRANT PROJECT MANAGEMENT MATRIX

PROJECT GOAL ONE: Organize South Carolina Health Insurance Policy Advisory Committee, hire grant staff and data consultants to assist with project goals.

Action #	Action Taken	Dates	Additional Information
1	HIPAC team determined		15 original members appointed by the Director including representatives from South Carolina Small Business Chamber of Commerce and/or National Federation of Independent Businesses, small business representatives, consumers and representatives of consumers that receive care and for whom insurance has a direct economic impact, the South Carolina Hospital Association, the South Carolina Medical Association, the insurance industry and others that manage health care risks, Community Health Centers, and government agencies to include the DOI, ORS and DHHS.
2	Pierre Barakat hired as Project Manager for Data Collection/Analysis	11/4/02	Initiate processes in accordance with South Carolina law that will result in selection of necessary grant personnel.
3	Viki Fox hired as Policy Project Manager	11/18/02	Initiate processes in accordance with South Carolina law that will result in selection of necessary grant personnel.
4	Frank Knapp, South Carolina Small Business Chamber of Commerce, selected to assist with organizing small employer focus group.		No contract necessary.

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5	Mary Tyrell, Office of Research and Statistics, contracted to administer surveys and focus groups.	Contract signed:	<p>Initiate processes in accordance with South Carolina law that will result in selection of necessary contractors. Through open bid process, data consultant hired with interviewers to collect data ethically in accordance with data collection protocols.</p> <p>Employee Health Insurance survey, South Carolina Health Insurance Survey, Uninsured Survey. Focus groups to include (1) small businesses who offer health insurance (2) small businesses who do not offer health insurance, (3) providers, (4) insurance agents/brokers, (5) social services agencies (rural health clinics), (6) the uninsured, and (7) insurance executives.</p> <p>ORS contracted with Charles Duke, Clemson University, to conduct focus groups. Contract signed:</p>
6	Bob Oldendick, Institute for Public Service and Policy Research at USC, contracted to conduct the South Carolina Household Survey.	Contract signed:	<p>Initiate processes in accordance with South Carolina law that will result in selection of necessary contractors. Through a contract between state agencies, data consultant hired with interviewers to collect data ethically in accordance with data collection protocols.</p>

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PROJECT GOAL TWO: Educate HIPAC members on current health insurance public and private, existing South Carolina uninsured data and policy options through regularly scheduled meetings.

Action #	Action Taken	Meetings Dates	Issues Discussed
1	HIPAC Meetings		Organizational meeting of the HIPAC will be conducted. Review data, options and potential solutions. Prioritize based upon funding priorities. Review plans for data collection.
1.1	Organizational meeting held at the SCDOI	11/19/02	Overview of health insurance market and the grant project.
1.2	Second meeting held at SCDOI	12/19/02	Educational meeting...discussed health insurance premium increases, HIPAA privacy, and expansion options for the uninsured. Handout provided on uninsured in South Carolina. Meeting and training session will focus on the objectives for the project, analysis of the existing data, and the project schedule. Monthly meetings will be held based upon a predetermined schedule.
1.3	Third meeting held at SCDOI	1/16/03	Data collection summary provided. Also discussed coverage options, including the South Carolina Health Care Access Network.
1.4	Fourth meeting held at SCDOI	2/20/03	Discussed proposed legislation on South Carolina Small Employer ... presented by Frank Knapp and Tom Churan. Overview of the data collection process by David Patterson, Bob Oldendick and Charles Duke. Discussed Policy Task Force and Cover the Uninsured Week.
1.5	Fifth meeting held at SCDOI	3/27/03	Presentation from Lathran Woodward on Community Health Centers. Update provided from Data Subcommittee and Policy Development Subcommittee. All updates are available on the website.
1.6	Sixth meeting held at SCDOI	4/24/03	
1.7	Seventh meeting held at SCDOI.	5/22/03	
1.8	Eighth meeting held at SCDOI	6/26/03	

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Action #	Action Taken	Meetings Dates	Issues Discussed
2	Distribute research summaries/Issue Briefs to members as it relates to meeting topics.	N/A	“Who are the Uninsured in South Carolina” distributed 12/17/02. “Summary of Some Existing Policy Coverage Options” distributed on 1/16/03. “Overview of HRSA and State Initiatives meetings in Washington, D.C. distributed on 2/20/03.
3	Invite outside speakers to present information to members on related topics.	N/A	Will Shrader, BCBSSC discussed cost controls on 12/19/02 Francis Griggs, BCBSSC discussed HIPAA on 12/19/02 Ben Wheatley, State Coverage Initiatives, discussed coverage options on 12/19/02 Dr. Casey Fitts and Dr. Tom Brown discussed Community Care Centers on 1/16/03. Frank Knapp and Tom Churan presented a self-insured small employer insurance plan option presented to the Legislature on 2/20/03. Lathran Woodward, Executive Director of the South Carolina Primary Health Care Association, spoke about Community Health Centers in 3/27/03 meeting.

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PROJECT GOAL THREE: Collect and analyze primary data, through key informant interviews, surveys and focus groups, that will enable DOI/HIPAC to identify who the uninsured are, the reasons for their uninsured status and barriers to access to health insurance.

Action #	Action Taken	Date(s)	Responsible Party	Additional Information
1	Key Informant Interviews: 1.1 Insurance Manager for Large Corporation 1.2 Faith-Based Administrator 1.3 Human Resources Officer for a Corporation 1.4 Rural Health Clinic Administrator 1.5 Rural Health Director Health System Administrator 1.6 Insurance Company Administrator 1.7 State Government Administrator 1.8 Community/Provider Coalition Representative 1.9 Health Coalition Administrator 1.10 Company Human Relations Director 1.11 Elected Official	Various	Pierre Barakat	Interviews completed 12/30/02. Summary Report completed and reported to HIPAC on 1/16/03.

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Action #	Action Taken	Date(s)	Responsible Party	Additional Information
2	South Carolina Employee/Employer Health Insurance Survey	Due: Descriptive Results of Employer Survey due to HIPAC July 2003. Employee Survey abandoned as of 3/20/03.	SCDOI/ORS/HIPAC	Completion Date: Approval of overall research design, sampling plans and instruments by SHADAC on 10/10/02. Household survey is based on Minnesota prototype. Complete staffing of ORS team 2/3/03.
2.1	Review and finalize survey instrument	12/9/02	SCDOI/ORS/HIPAC	Distribute to appropriate parties and modify as necessary.
2.2	Sample design and data collection – Develop and finalize sampling frames and weighting schemes.		ORS	Target sampling method that can achieve desired sample size in chosen geographic area. Assess sampling errors and effective sample sizes within and between chosen geographic units. Computer system supports the collection of data germane to the project goals. Sampling plans and specs for sample negotiated with ESC 2/11/03. Agreement in principle re: confidentiality and delivery 2/13/03.
2.3	Test survey instrument		ORS	N/A

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Action #	Action Taken	Date(s)	Responsible Party	Additional Information
2.4	Field survey instrument	<p>Refinement of Employer survey instrument 3/20/03 (final version)</p> <p>Refinement of Employee survey instrument 12/9/02 – N/A</p> <p>Surveys scheduled to be mailed by 4/11/2003.</p>	ORS	<p>Achieve desired sample size for all groups with accurate data collected within 4 months. The household, employer and insurer surveys will be fielded. The data collected from the employer survey should provide data on whether insurance is offered, changes in benefits, coinsurance. Employer information may be obtained and a non-random sub sample. The survey data should provide info on benefit patterns and changes in benefit patterns. In addition, we will (1) conduct interviews of small business representatives and insurance industry representatives; (2) Conduct employer focus groups (sample will be representative of demographic composition of the state); (3) Conduct household focus groups (samples will be diverse representing the geographic, demographic and fiscal characteristics of the state); (4) field surveys...data is collected in a manner consistent with project analytical and policy development goals.</p>

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Action #	Action Taken	Date(s)	Responsible Party	Additional Information
2.5	Data Cleaning and Preparation of weights		ORS	Data may be used for developing state and local insurance estimates based on weights that allow generalizations to the state's general population. The data is compared over time to ensure quality. Systematic qualitative and quantitative assessment of data is performed. Information used to develop and design coverage options and health insurance programs. Post collection and data processing to deliver a clean, edited, and machine-readable data set. Activities conducted on time and on target.

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3	South Carolina Household Survey	Due: Descriptive Results due to HIPAC July 2003 Uninsured over sample will be reported in July 2003.	SCDOI/Oldendick/HIPAC	Completion Date: As of 4/3/03...825 completions received (70% completion rate...no problems. David Patterson will initiate conversation with SHADAC to confirm weighting. Bob Oldendick confirmed that they will provide standard weighting (race, age, sex) and will report in SPSS format.
3.1	Review and finalize survey instrument	12/9/02	SCDOI/Oldendick/HIPAC	Same as 2.1
3.2	Sample design and data collection – Develop and finalize sampling frames and weighting schemes.		Oldendick	Same as 2.2
3.3	Test survey instrument	Completed on 1/6 /03	Oldendick	Field test the modified survey instrument to ensure that it is within specifications.
3.4	Field survey instrument		Oldendick	Same as 2.4
3.5	Data Cleaning and Preparation of weights		Oldendick	Same as 2.5
3.6	Comparison of uninsured to commercial/government insured			

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Action #	Action Taken	Date(s)	Responsible Party	Additional Information
4	South Carolina Uninsured Utilization Survey	Due: Descriptive results due to HIPAC July 2003	SCDOI/ORS/HIPAC	<p>Completion Date:</p> <p>Approval of overall research design, sampling plans and instruments by SHADAC on 10/10/02 based on Wyoming prototype.</p> <p>Complete staffing of ORS grant team 2/3/03 (2 half time positions, Jr. statistician and administrative/data entry).</p> <p>As of 4/3/03...response rate still low, received 45- to 500. Non-response due to bad addresses.</p>
4.1	Review and finalize survey instrument		SCDOI/ORS/HIPAC	Final instrument selection completed on 10/31/02.
4.2	Sample design and data collection – Develop and finalize sampling frames and weighting schemes.		ORS	Sampling frame extracted from UB-92 data system on 1/03/03. Final sample selection, mail out quality control process established and data quality control process completed 2/3/03.
4.3	Test survey instrument		ORS	N/A
4.4	Field survey instrument		ORS	<p>Wave 1 (2,500) completed 2/7/03</p> <p>Data entry screens finalized and tested 2/13/03</p> <p>Wave 2 (2,500) mailed 2/19/03</p> <p>Wave 3 (2,500) mailed 2/126/03</p>
4.5	Data Cleaning and Preparation of weights		ORS	Same as 2.5

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Action #	Action Taken	Date(s)	Responsible Party	Additional Information
5	Summary Report based on Survey instruments	Due to SCDOI: 5/15/03	ORS/Oldendick/SCDOI	Summarize findings to present to the survey communities to allow opportunities for discussion. Obtain feedback from the participants about whether it was valuable to participate in the survey process.

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Action #	Action Taken	Date(s)	Responsible Party	Additional Information
6	Focus Groups	Due: Descriptive results due to HIPAC May 2003	ORS/Duke	To be completed by: 4/30/03 Determined that focus groups should include (1) small businesses who offer health insurance (2) small businesses who do not offer health insurance, (3) providers, (4) insurance agents/brokers, (5) social services agencies (rural health clinics), (6) the uninsured, and (7) insurance executives.
6.1	Determine number and locations of focus groups.	Locations Charleston Columbia Greenville Anderson Myrtle Beach Orangeburg Agent Focus Group – Columbia: June, 2003 Employee Focus Group – Columbia: June/July 2003		CHAS - Employee 3/10/03 Employer 3/11/03 COLA – Employee/Hispanic 3/12/03 Employer 3/13/03 GREENVILLE – Employer 3/6/03 ANDERSON – Employee 3/17/03 MB – Employee 3/24/03 Employer 3/25/03 ORANGEBURG – Employee 3/26/03 Employer – cancelled...to be rescheduled in another location mid-April McCORMICK COUNTY – Employer 4/17/03

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Action #	Action Taken	Date(s)	Responsible Party	Additional Information
6.2	Develop format for sessions.	Complete		Plan and develop questions; focus group tools must be adequate for targeted population groups; identify moderators; conduct training sessions; moderators conduct focus group with use of ETV and Council of Government sites; transcribe results in analysis sessions; data prepared for analysis.
6.3	Determine meeting logistics	Complete		Areas of the state, meeting rooms, etc.
6.4	Conduct focus groups	<p>Hispanic Focus Group – Columbia, 3/12/03</p> <p>Employee focus group - Columbia, 3/12/03</p> <p>Employer Focus Group – Charleston, 3/12/03</p> <p>Employee focus group – Charleston, 3/12/03</p>		Obtain feedback from moderators, focus group consultant, and participants as to determine whether focus groups need to be modified. Do moderators understand the complexities of insurance sufficient to be able to explain? Are there enough participants for the sessions to be meaningful? Should they be organized differently? Do moderators agree on what was stated in the sessions? Are results of the focus groups being reported accurately?

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Action #	Action Taken	Date(s)	Responsible Party	Additional Information
6.5	Analyze the results of the focus groups			Report findings from focus group work. Discuss the group's understanding of health insurance, how it works, and thoughts on potential solutions. Ensure that report accurately reflects what was stated during the focus groups.
6.6	Summary Report based on Focus Group Meetings.	4/9/03 – raw transcripts received. Spanish – due 4/14/03		Transcripts will be complete by Monday, 4/7/03. Hispanic transcript will take an additional 2 weeks.
7.0	State Planning Database			Meeting with Shirley Tyson to set up database set for 3/13/03.
7.1	Mail survey questions to S. Tyson			
7.2	Develop and mail code book for each survey to S. Tyson			

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PROJECT GOAL FOUR: Based on the data presented, determine how the state may improve upon successful public program or design new strategies, programs and/or initiatives to improve access to health insurance coverage and to ensure that those with insurance do not lose coverage.

Action #	Action Taken	Dates	Responsible Parties	Additional Information
1	Analysis and Development of Recommendations and Coverage Options		HIPAC Subcommittee, SCDOI, grant personnel, consultants	<p>Review results; model health insurance purchasing behavior; identify the uninsured; develop uninsured estimates and characteristics; compare summary of existing data to findings of data collection efforts evaluate existing employer subsidies. Consider development of program using SCHIP funds waiver application to allow specificity; analyze costs as barrier; analyze employer behavior in face of rising health insurance costs. Solutions are prioritized. Actuarial staff assists with policy development.</p> <p>Analysis strategies are reviewed and approved by partners. Analysis describes barriers to insurance, uninsured residents, and concerns of those who have coverage but fear losing it. Determine from data whether expansion of existing programs is feasible or whether new initiatives must be created. Attempt to answer questions about why individual are uninsured or decide not to disenroll from public programs. Solicit input from expert consultants. Review data from other state studies of this issue. Review barriers to enrollment. Do a forecast for the state.</p>
1.1	Ben Wheatley presentation to HIPAC on HRSA grants	12/17/02		Presented at December HIPAC meeting.
1.2	Issue Brief on coverage options utilized by other states.	1/9/03	Viki Fox	Report of coverage options to HIPAC on 1/16/03.

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Action #	Action Taken	Dates	Responsible Parties	Additional Information
1.3	Identify and report on projects that have been implemented in South Carolina and determine their future success.	1/1/03	HIPAC/DOI	SHADAC report received 3/27/03. South Carolina Health Access Network presentation at 1/16/03 meeting.
1.4	Brainstorm with HIPAC Subcommittee on feasible coverage options for South Carolina in 2004 and beyond.	3/4/03 and 3/20/03	HIPAC Subcommittee/DOI	Policy Options list presented at 3/27/03 Meeting. Next Subcommittee meeting 4/10/03.
1.5	Obtain consensus on coverage options after reviewing data from surveys and focus groups.	Aug/Sept 2003	HIPAC/DOI	

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Action #	Action Taken	Dates	Responsible Parties	Additional Information
2	Draft Coverage Options		HIPAC Subcommittee/DOI/ HIPAC	Use findings to develop coverage option initiatives. Initiatives should focus on providing affordable health insurance. Present initiatives to HIPAC. Get input from HIPAC, contractors, advocates, supporters and other stakeholders. Develop final recommendations on initiatives.
2.1	Create report on all coverage options chosen by HIPAC		Viki Fox	
2.2	Assign subcommittees to present each option before the full Committee.	2/20/03	HIPAC/DOI	Viki Fox, SC DOI Jim Hart, SCMCA Larry Fernandez, DHHS Bill Mahon, SCMA Casey Fitts, M.D., SC Health Access Plan Frank Knapp, SC Small Business COC Jim Head, SCHA
2.3	Determine funding needed to implement each option.		Subcommittees	
2.4	Identify agencies involved in each option		Subcommittees	
2.5	Develop pros and cons for each option		Subcommittees	
2.6	Eliminate options, as necessary		HIPAC/DOI	
2.7	Rank options in order of preference determined by HIPAC		Viki Fox	
2.8	Draft report of coverage options to Gwen Fuller	9/30/03	Viki Fox	

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PROJECT GOAL FIVE: Present HIPAC policy findings to policymakers and leaders within the state in order to facilitate implementation of the initiatives and strategies identified as possible solutions to improvement of health insurance access.

Action #	Action Taken	Dates	Responsible Parties	Additional Information
1	Report to the Secretary	If extension is approved, due no later than 7/31/04	SCDOI/grant personnel	
1.2	Conduct Assessment of Project.			Get input on whether the expectations of the grant were met. Study results presented clearly.
1.3	Prepare Draft Report in accordance with grant guidelines.			Prepare Draft Report for submission to the Secretary, Governor and Members of the General Assembly by June 30, 2003. Report identifies feasible policy recommendations and outlines implementation steps.
2	Submit no cost extension request	Mailed 4/17/03	V. Fox	Due to HRSA by 4/30/03
3	Submit Interim Progress Report to HRSA	Due 7/31/03	V. Fox	
4	Legislative Changes			Submit in October 2003 for 2004 legislative session.
5	Conduct Health Insurance Forums	Aug/Sept 2003	HIPAC/SCDOI	Report is presented to members of the public and General Assembly utilizing capabilities of education television. Forum will be publicly broadcast. Input received from participants. Assess acceptance of recommendations and the ability of the group to implement within recommended time frames. Edit Report as necessary.
6	ETV Program	Fall/Winter 2003		
7	Legislative Approval	Feb – June 2004		
8	Submit Report to Secretary	No later than 7/31/04	SCDOI	Final Report is submitted to Secretary by June 30, 2003. Governor submits to Secretary and members of South Carolina General Assembly and South Carolina's Congressional delegation.

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